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SECTORAL POLICY QUESTIONS: INDUSTRIAL DEVELOPMENT DECADE FOR AFRICA

Implementation of the programme for the Second Industrial Development Decade for Africa (1993-2002)

Report of the Secretary-General

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I. INTRODUCTION

1. In a rapidly changing global economy, Africa faces formidable challenges which further underline the need for sustained implementation of the programme for the Second Industrial Development Decade for Africa (1993-2002). Many specialized agencies as well as funds and programmes of the United Nations provide assistance that supports the efforts of African countries in achieving the objectives of the Second Decade. The present report, which is submitted in response to General Assembly resolution 50/94 of 20 December 1995, focuses on the activities of the Economic Commission for Africa (ECA) and the United Nations Industrial Development Organization (UNIDO), the two main organizations directly involved in the implementation of the programme for the Second Decade, as well as the newly adopted Alliance for Africa's Industrialization initiative. The Alliance has been endorsed by the Assembly of Heads of State and Government of the Organization for African Unity (OAU) at its thirty-second and thirty-third ordinary sessions, as the new mechanism for the attainment of the goals of a refocused programme for the Second Decade.

2. The formulation and implementation of programmes for the Second Decade took into consideration the following objectives of the Decade:

- Structural transformation of African economies:
  - Industrial strategies and policies;
  - Development of industrial subsectors, especially agro-industries;
  - Environment and energy;
- Linkages between industry and other economic sectors:
  - Linkage between industry and agriculture;
  - Support to transport and communications and linkage with the United Nations Conference on Trade and Development (UNCTAD);
- Mobilization of financial resources for:
  - Investment promotion and transport of technology;
  - Project identification, preparation and promotion;
- Private-sector development;
- Human resources development and training;
- Promotion of regional/subregional industrial cooperation:
  - Support to regional and subregional organizations;
  - Cooperation with OAU/ECA/African Development Bank (ADB);

- Cooperation with other international organizations.

3. In implementing resolution 50/94 it was imperative to consider the global economic trends summarized in section II below and the challenges facing African industries and the private sector. In section III details of specific projects and programmes implemented under the Second Decade and issues related to funding are addressed. The report presents in section IV efforts to reorient the programme for the Second Decade in the light of these global trends and as an integral part of the reform process in UNIDO and ECA.

II. ECONOMIC REFORM, GLOBALIZATION AND INDUSTRY IN AFRICA

4. World industry is undergoing a revolutionary transformation of production structures and technologies. The revolution is characterized by the growing globalization of industrial production based on a far-reaching liberalization of international trade and investment flows. The combination of the increased global integration of industrial production and the spread of new manufacturing, information and communication technologies holds the promise of a major increase in world prosperity. While developing countries have significant opportunities to access markets, new products and new technologies, not all will automatically be able to exploit these opportunities.

5. Despite significant improvements in Africa's economic growth performance in the last two years, characterized by a decline in the number of countries experiencing negative growth and an increase in the number of countries recording real growth rates in their gross domestic product (GDP), the continent's overall economic conditions remain precarious. While there is significant progress in the commitment of Governments to market reforms, empowerment of the private sector and macroeconomic stabilization, the performance in industry has been weak. It is evident that it is becoming ever harder for African countries to build and sustain competitiveness on the basis of lower-order comparative advantages such as inherited natural resources or low-wage labour. Further, globalization is changing the rules of the game for all participants but in the process the gap is widening between those nations that achieved the industrial critical mass necessary to become competitive globally, and those left behind. As a result, the skills and technology entry barrier to becoming an industrial economy has risen substantially.

6. The problem of the widening industrialization and technology gap is acknowledged to be particularly acute in sub-Saharan Africa, with 33 of the world's 48 least developed countries, while macroeconomic stabilization programmes have been adopted by most African countries since the early 1980s in an attempt to create an enabling environment for long-term growth, they have usually not included any specific measures to promote industrial development. Their results have underlined the fact that while macroeconomic stability is a necessary precondition, it is not sufficient in itself for economic transformation. Macroeconomic reforms need to be complemented by strategies and programmes designed to generate the required supply response from the industrialists and the private sector in general. Adjustment programmes assumed - wrongly - that getting prices right was sufficient to ensure industrial recovery and growth. Competitiveness, the need for technological

upgrading, a focus on style, quality, design and timely delivery: none of these elements found their way into traditional adjustment programmes, where it was automatically assumed that comparative cost, in the form of cheap labour, would be sufficient. Yet almost all of the evidence shows that this was not the case.

7. Africa's poor economic performance is particularly reflected in, and to a great extent caused by, a correspondingly poor industrial performance. In many countries the rate of growth of manufacturing value added (MVA) has fallen short of the rate of overall GDP growth, resulting in a declining share of MVA in GDP. Sub-Saharan Africa has lost market share in terms of MVA, with its share of global manufacturing production halving from 0.6 per cent in 1970 to 0.3 per cent in 1995. The share of manufacturing in total African exports has barely changed over the last two decades and is still below 10 per cent.

8. The pattern of industrialization has also been lopsided with six countries contributing almost three fourths of the regional MVA. One country, South Africa, accounts for 58 per cent of regional MVA, while the five next most industrialized States - Nigeria, Cameroon, Zimbabwe, Côte d'Ivoire and Kenya - account for another 16.5 per cent. Further, four fifths of sub-Saharan Africa's industrial production is classified as low-technology and the shares of the capital-intensive and higher-technology subsectors have declined.

9. The crucial challenge facing policy makers in government and the multilateral agencies is that of framing a new industrial strategy for sub-Saharan Africa in the twenty-first century. Whatever its limited success in other fields, structural adjustment has not yet succeeded in reversing the recent trend towards de-industrialization and in creating an appropriate policy environment for sustained industrial growth. In the light of the above, it is critical to emphasize the need for renewed efforts to accelerate industrial development in Africa through private-sector-led strategies and new global partnerships. In this connection, the Assembly of African Heads of State and Government of OAU at their thirty-third ordinary session, in June 1997, adopted the Harare Declaration (Dec.4(XXXIII)) on African industrialization in which they, inter alia, decided to redouble efforts to promote sustainable industrial development to overcome major economic and social constraints and achieve a greater stake in the global market place as called for in the Lagos Plan of Action and the Abuja Treaty Establishing the African Economic Community.

10. The leaders also reaffirmed their belief that, without sustainable industrial development, African economies would be condemned to persistent economic crisis, dependence on humanitarian relief and deepening poverty, despair and political unrest with dire consequences for global peace and stability. In that connection, they endorsed the launch of the Alliance for Africa's Industrialization and adopted its plan of action for reorienting the Second Decade towards the establishment of partnerships for the promotion of private-sector-led industrial development.

III. UNIDO AND ECA SUPPORT PROGRAMMES

A. UNIDO's support programme and activities for the Second Decade

11. UNIDO allocates from its regular budget funds every biennium specifically for the implementation of projects and programmes under the framework of the Second Decade. The financial allocation of the programme for the Decade for the period 1994-1995 was US$ 10,536,900, and for the period 1996-1997, $10,600,000. The services delivered by the programme were also provided, taking into consideration the objectives and areas of concentration of the United Nations New Agenda for the Development of Africa in the 1990s. It is significant to note that the least developed countries accounted for a high proportion of projects and activities financed from the funds allocated for the Second Decade. Indeed, it was an established guideline that at least 50 per cent of the resources of the programme should benefit projects and activities for least developed countries.

12. During the biennium 1994-1995, a total number of 104 projects were undertaken, 65 per cent of them at the regional level and 35 per cent designed and implemented at the national level. During the same period, some 81 short-term technical advisory services missions were carried out to assist Governments and private-sector entities in various countries. In the 1996-1997 biennium, 96 projects had been implemented as of 31 August 1997, 40 per cent of which were at the national level and 60 per cent at the regional level.

13. The technical cooperation projects carried out included support to industries establishing linkage between industry and agriculture, with special emphasis on food production and food processing, and between industry and transportation and communications. The assistance given covered agro-related industries such as agricultural and food processing machinery, fertilizers, pesticides and local manufacture of transportation, communications and telecommunications equipment. Emphasis was also placed on programmes including multi-country and large-scale national projects promoting economic integration at subregional and regional levels as a part of efforts directed towards the establishment of the African Economic Community. Special attention was accorded to the development and promotion of small- and medium-scale industries in an effort to promote local entrepreneurship and private-sector development. Equally important were cross sectoral priorities such as human resources development, technology development, acquisition and transfer, formulation of industrial strategies and policies, integration of women in industrial development, energy and environment.

14. Several projects and programmes were focused mainly on strengthening industrial institutions, private-sector development, small- and medium-scale industry, investment promotion and technological development, the introduction of cleaner production techniques and the development of human resources for industry. Examples of successfully approved projects and programmes under the Decade include:

- Promoting partnership between Africa's budding entrepreneurs from the Jua Kali in Kenya and rural women in Burkina Faso to boost

entrepreneurship, create new manufacturing capabilities and promote quality and new product lines;

- Increasing the value added to the processing of local raw materials; the transformation of hides and skins into exportable leather products in eight eastern and southern African countries; the manufacture of wood products in order to provide opportunities for the environmentally sustainable development of forest resources in seven western and central African countries; the processing of spices and aromatic products in Zanzibar; and the introduction of new techniques for the production of salt in the Plateau State of Nigeria;

- In the Mozambique Channel and the Gulf of Guinea, UNIDO is working in partnership with African countries in the creation of new enterprises and in the establishment of a private-sector-led industrial base through its integrated assistance to small- and medium-scale industrial enterprises, and through the establishment of industrial associations, SMI clusters and subcontracting schemes with larger enterprises;

- UNIDO is equally involved in the promotion of better food quality and food security through the establishment of quality guidelines in the food sector in seven African countries and through its promotion of enhanced local food processing;

- UNIDO is actively engaged in the introduction of cleaner production techniques in industry in many African countries, ranging from the phasing out of ozone-depleting substances to the identification of appropriate solutions to the problem of mercury pollution caused by artisanal gold mines;

- Mobilizing investment resources for African industry, building partnerships between African and foreign enterprises, and promoting technology transfer is one of the major activities of UNIDO which is gradually but increasingly, showing successful results in Cameroon, Ghana, Madagascar and the United Republic of Tanzania.

15. It is important to note that the resources made available by UNIDO in support of the programme for the Second Decade, as had been understood from the inception of the programme, is to be seen as seed money that should lead to the mobilization of additional resources, both bilateral and multilateral from within and outside countries to support the development of the industrial sector and particularly the private sector. Although mobilization of financial resources has become a difficult exercise over recent years mainly as a result of the decline in official development assistance (ODA) and multilateral grants, a few successful cases can be reported in which the seed money concept has fully operated and achieved remarkable results:

- A project for the establishment of multi-purpose platforms for food processing specifically designed to alleviate the burden of grain and other foodstuff processing on women in rural areas started in Mali and Burkina Faso with initial funding from the UNIDO programme for the

Second Decade and was later able to attract a sizable contribution from the International Fund for Agricultural Development (IFAD) and from the United Nations Development Programme (UNDP). The success of the project has prompted many requests from other countries. The concept is now being introduced through an integrated regional programme to five other countries in West Africa;

- An initial funding from UNIDO to assist the Government of Côte d'Ivoire in updating and finalizing an analysis of its industrial subsectors as part of its economic vision for the year 2025 prompted UNDP to join the exercise with a contribution of $500,000. Further consultations are under way between the Government and the African Development Bank, which has shown a keen interest in the agro-industrial component;

- In Uganda a Decade-related project to enhance quality control and standardization through the introduction of ISO 9000 and ISO 1400 with the aim of improving the competitiveness of local industry, has attracted $6 million from UNDP and the European Union;

- A preparatory assistance provided under the Second Decade as a follow-up to a successful investment Promotion Forum held in the United Republic of Tanzania in 1996 has led to the development of a large-scale integrated programme for the development of the private sector supported by UNDP in the amount of $2.5 million.

B. ECA's support programme and activities for the Second Decade

16. The Economic Commission for Africa has continued to concentrate its activities on providing technical assistance to member States in the field of policies, planning and institution-building with a view to accelerating the implementation of the programme for the Second Decade. It must be stressed, however, that ECA support programme and activities for the Decade were wholly financed from the Commission's regular budget. ECA support activities to the Decade were mainly focused on the preparation of technical publications, research studies and the organization of ad hoc expert group meetings.

17. ECA carried out a number of studies in support of the Second Decade programme implementation. Technical studies and ad hoc expert group meetings were also organized during the period under review to give high-level African experts the opportunity to discuss and share their experiences on specific topics and review the studies before finalization, reproduction and distribution to African end-users including planners, policy makers, industrialists, manufacturers and potential investors. The subjects of the studies included:

- Possibilities and perspectives for the production of basic chemicals from natural gas in Africa;

- Promotion of investment and industrial projects in the context of the Second Decade;

- Technology transfer, acquisition and negotiation;
- Development of African metal industries based on South-South cooperation;
- Utilization and perspectives for the integrated development of natural resources and for the production of phosphate;
- Manual for trainers for small-scale industries;
- Manufacturing of irrigation equipment in the Sahel countries;
- The leather and leather products industry in Africa: current status and prospects;
- Measures to consolidate privatization in the African industrial subsector with special emphasis on the Second Decade;
- The study of institutions and modalities for promoting the financing of small and cottage industries in Africa.

18. Within the context of the Second Decade, the ECA secretariat has produced various technical publications. In the field of industrial policies and planning, the thrust of the activities of ECA was directed at assisting African countries in reformulating existing industrial policies and plans as well as formulating new policies whenever necessary with a view to reorienting such policies and plans towards facilitating the implementation of the programme for the Decade. The Commission's activities took the form of recurrent and non-recurrent publications, including:

- Investment and Financial Policies and their Impact on the Development of Indigenous Industries;
- Lessons from Selected Newly Industrialized Countries for the Effective Implementation of the Second Decade;
- Sustainable Financing of Selected Second Decade Multinational Industrial Projects in African subregions;
- Selected technologies available with or without Licensing in the context of the Second Decade;
- Factors in Enterprise Formation in African Countries;
- Possibilities and Perspectives on the Development of the Petrochemical Industries in North Africa on the basis of Local Reserves of Oil and Gas;
- Building Materials and Construction Industries in Africa: Constraints and Prospects for Socio-Economic Development;

- Study on Africa's Potential Industrial Comparative Advantage in an Emerging New Economic Order;

- Modalities for South-South Cooperation;

- Approaches to the Formulation of Comprehensive Construction Industries Planning and Implementation Policies in Africa;

- Lessons for Africa from Selected Case Studies on the Development of the Mining and Metallurgical Industries;

- Possibilities of Utilization of Biomass for the Production of Basic Chemicals in Africa;

- Survey of Africa's Basic Industries;

- Survey of Africa's Agro-based Industries;

- Promotion of African Fertilizer and Petrochemical Industries.

19. Four issues of the bulletin, Focus on African Industry, were published. The articles in the four publications covered a wide spectrum of issues, including the critical role of the informal sector in the development of indigenous industrial capabilities; the development of international competitiveness; the private sector and entrepreneurship development; privatization in Africa; the Uruguay Round Agreements and implications for African industry; and the current status of African metallurgy industries and prospects for the year 2000.

20. In order to assist African countries in the development and promotion of entrepreneurial and technological capabilities, two Directories of Project Profiles for Small-scale Industries were produced. The two directories provided techno-economic information on, among other things, products to be manufactured, process description, capacity and specifications for plant and machinery, raw materials and other inputs, financial requirements in the form of fixed and working capital, marketing and product distribution, and a programme to assist and advise small-scale industrial entrepreneurs in their manufacturing activities. A Manual for Trainers in the Development of Entrepreneurship in Small-scale Industries was produced and disseminated.

21. In order to assist member countries in their efforts to develop and promote industrial cooperation at subregional and regional levels, in 1993 the ECA secretariat prepared a technical publication on Industrial Development Priorities and Subregional Cooperation in the context of the Second Decade. The document identified industrial priorities in each subregion and made concrete recommendations for accelerating African industrial development.

IV. REORIENTING THE SECOND DECADE

22. In resolution 50/94, the General Assembly called for further assistance to African countries with a view to improving the competitiveness of the industrial

sector in Africa in the light of globalization of production and the growth of related trade, investment and technology flows. As an input into the process of reviewing and reorienting industrial development strategies in Africa to enhance industrial growth and competitiveness, UNIDO, in collaboration with ECA and OAU, adopted two complementing strategies: (a) an in-depth mid-term evaluation of the Second Decade, and (b) extensive consultations with the Bureau of the Conference of African Ministers of Industry, key private-sector groups, African policy makers, experts and representatives of other United Nations agencies to establish a new partnership for promoting private-sector-led industrial development in Africa.

A. Mid-term evaluation of the Second Decade

23. A mid-term evaluation of the programme for the Second Decade was completed in 1997. The specific objectives of the evaluation were: (a) to assess the achievements of the programme against its stated objectives and expected outputs; (b) to identify and assess the factors that have facilitated the achievement of the programme's objectives, as well as those factors that have impeded the fulfilment of those objectives; (c) to propose a course of action, both at the policy and the programme implementation level, and to draw lessons therefrom for the design, implementation and monitoring of the programme for the future; and (d) to examine the relationship of the programme to the Alliance for Africa's Industrialization, the new initiative launched by African heads of State and Government at Abidjan on 23 October 1996.

24. The evaluation revealed that, like the Lagos Plan of Action, the Second Decade was an expression of intentions and desires for Africa's industrialization. The evaluation noted that efforts should be redoubled to translate the objectives of the Second Decade into concrete and practical programmes for the implementation of which funds could be mobilized. Special implementation mechanisms, at the country level need to be established and/or strengthened, and the existing national machinery, i.e. ministries of industry and trade or planning, should be encouraged to assume that responsibility.

25. Further, implementation strategies advocated were not adopted at the country level, the nascent African private sector was not fully prepared to assume the new responsibilities in the industrial investment process and financial support, including term lending, from both domestic and foreign sources was not readily available for industrial projects.

26. The evaluators recommended that:

- The scope and coverage of the programme should be narrowed to make it compatible with a country's capacity to mobilize its human, natural and financial resources for implementation;

- Governments should concentrate on those segments of the programme that are considered necessary prerequisites for industrial development while leaving the productive and manufacturing aspects to the private sector;

- Governments should intensify their efforts to promote the economic environment and political stability that will make private-sector initiatives possible and productive;

- The private sector and the industrial community as a whole should be given support to build up their capacity and enhance their competitiveness;

- The donor community especially should be invited to take a serious look at the revised priorities, including the Alliance programme for private-sector enhancement through partnerships, and the opinions, endorsement and participation of the private sector and of chambers of commerce and related business associations should be solicited.

B. The Alliance for Africa's Industrialization

27. Bearing in mind the findings of the mid-term evaluation of the programme for the Second Decade and based on extensive consultations with various stakeholders in Africa, particularly private-sector groups and the Bureau of the Conference of African Ministers of Industry (CAMI), consensus was built around the launch of a new initiative to revitalize the programme for the Decade. The Alliance for Africa's Industrialization was thus launched in October 1996. The Alliance recognizes that globalization has changed the nature and pattern of industrialization.

28. In the new global context of liberalization, the private sector is assuming a large role in economic development, which is particularly important in rekindling African industrial development. It is in this context that the Alliance provides a mechanism for partnership between African leaders and the private sector to define industrial development visions for the next millennium and to commit political will and resources to their achievement. The goals of the Alliance are:

- To develop African-generated industrial development visions and strategies addressing, directly and effectively, Africa's principal economic problems of low industrial output, food insecurity, unemployment, poverty and environmental degradation;

- To stimulate increased international commitment to African industrial development and generate support for sustainable industrial growth and competitiveness in Africa through the strengthening of national capacities at the policy, institutional and enterprise levels;

- To promote regional industrial relationships aimed at economies of scale and meeting the emerging demands in regional and international markets, within the context of environmentally sustainable development.

29. The Alliance is also an input into and complementary to the United Nations System-wide Special Initiative on Africa and the United Nations New Agenda for the Development of Africa in the 1990s. The Special Initiative provides a

unique opportunity for inter-agency cooperation and has set five priorities, namely water, food security, governance, social and human conditions and resource mobilization. The Alliance synthesizes the industrial dimensions of the Special Initiative into a consistent programme for poverty alleviation through employment creation and enhancement of industrial competitiveness. In so doing, it takes full cognizance of the Initiative principle that, while Africa needs external support, it is the Africans themselves, men and women, who must take charge of their destiny and who should have the fundamental responsibility for bringing about development on their continent.

30. Under the Alliance the initial thrust is on linking industrial and agricultural development. This is fully in line with the predominant role of the agricultural sector in African economies, the potential for long-term comparative advantage of agro-based production, the multiple linkages between the industrial and agricultural sectors and their potential socioeconomic/economic impact through SMEs and informal-sector activities, particularly in rural areas. In this context, agro-industrial interrelationships encompass both the forward and backward linkages, involving industries such as agro-processing (food, wood, leather, textiles), agricultural input industries (agricultural machinery, equipment, tools, irrigation equipment, water treatment systems and fertilizers), as well as equipment and machinery for agro-processing industries.

31. Notwithstanding the initial focus on agro-industrial linkages, it is important to emphasize that the strategy of the Alliance will not be restricted to these industries as the diversity of resource endowments and policy priorities may warrant the adoption of different strategies in some countries. In this context, other industries in which African countries enjoy comparative advantages will be promoted, including mining, resource-based processing industries and some skill-intensive industries based on international subcontracting. The aim is to address those specific subsectors to which national decision makers attach greatest priority. At the same time, it is clear from the correlation between export expansion, inflows of foreign direct investment and industrial economic growth that countries following inappropriate policies and lacking adequate skills and technological capacities will be left behind in the globalization process. The acceleration of economic growth and industrial expansion requires an emphasis on openness, an optimal balance between market forces and selective phased intervention, macroeconomic stability and social programmes targeted at the most vulnerable groups.

C. The Alliance Plan of Action and its implementation

32. The Conference of African Ministers of Industry (CAMI), at its 13th meeting, held at Accra in May 1997, adopted a Plan of Action for the implementation of the Alliance. The Plan of Action spells out specific objectives to be achieved in order to fulfil the goals of the Alliance and the specific roles and actions to be undertaken (at the national, subregional and regional levels) and the areas where donors assistance would be most needed.

33. In his message to CAMI, the Secretary-General of the United Nations indicated that the Alliance would complement the United Nations Special Initiative, especially as the initiative placed emphasis on forging partnerships

between Governments and the private sector at the national, subregional and international levels. The implementation of the Plan of Action for the Alliance will be based on lessons derived from the mid-term evaluation of the Second Industrial Decade for Africa: in particular, the need for ownership of the Alliance by Africans themselves, demand orientation and bottom-up approach in programme development and the importance of constructive partnerships involving new actors, from within as well as outside Africa.

34. To ensure adequate African involvement in the policy- and decision-making process of the Alliance, an Alliance Steering Committee is being established by CAMI. The Steering Committee will consist of selected ministers of industry and eminent representatives of the private sector. At the country level, the key formulation and implementation mechanism for the plan of action will be the Industrial Partnership Council, consisting of representatives of the private sector and Government. UNIDO will assist countries in the programmes of action, including specific programmes in line with national priorities for which the necessary resources will be mobilized. UNIDO country directors will be particularly involved in providing the necessary support. To maintain global attention on the Initiative and African industrialization efforts, a special Group of Patrons, composed of selected heads of State, is being set up under the auspices of OAU to serve as advocates for African industrialization.

35. A proposal for the establishment of a special fund for the Alliance was discussed and approved by CAMI at its 13th meeting and fully endorsed by OAU. UNIDO will contribute to the Special Fund and consultations will be conducted by the Chairman of CAMI among member States and other United Nations agencies to raise pledges to the Fund. It is envisaged that a donors meeting will be organized during the last quarter of 1998 to finance national programmes. Other financing options will include development of high-impact integrated programmes in collaboration with other United Nations agencies under the auspices of United Nations System-wide Special Initiative on Africa and sectoral investment promotion forums at the national and subregional levels to attract private investment and foreign direct investment into industries.